



Memorandum

To: Anne Teresa, SFA
Vicki Wilson, SFA

From: Howard Weitzner, Accenture

Date: November 30, 2001

Subject: Deliverable 29.4.1b Training Services Summary

Purpose

This memo summarizes the results of Training Services provided to SFA University during the period November 1 – November 30, 2001. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

Initiatives this Period

Specific initiatives addressed during this period included:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- LMS Support
- TDC Support
- Project management

Planned Initiatives

During the period December 1 – December 31, the following initiatives may be addressed, but not limited to:

- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Development of the Learning Consultant role and capabilities
- LMS Support
- Manager development and performance support assistance
- TDC Support
- Project Management

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Description of Initiatives

SFA University strategic planning and organization development

Underlying other initiatives in this area is ongoing support for SFA University's efforts to develop and enhance its organization. Specific activities this period included:

- Conducting action planning follow-ups
- Facilitating cooperative partnership with Financial Partners channel
- Developing and conducting a working session for SFA University and SFA CIO web teams to consider existing processes and gather suggestions for future joint online ventures

With regard to action planning, SFA managers have developed workplans, including goals and roles, for their respective areas. These plans outline planned initiatives and corresponding staffing needs. During this process, activities included supporting each team to finalize their action plans and scope the work for each team. This support is ongoing, as each team begins work and completes major segments of work.

Training development and delivery methodology/Process team

The Training Development and Delivery team supports the creation and implementation of best practices for how SFA University develops and delivers training. The methodology (Plan It, Design It, Build It, Do It, Assess It) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the team updated its approach to developing materials. To allow individual team members to focus more closely on specific processes and documents, pairs of team members focused on the Plan It and Design It phases. These pairs worked together to determine the approach, refine templates, and simplify materials. On an on-going basis, the entire team gathers each week for a status update, at which time progress from each pair is shared with the larger group.

Currently, the team continues to create the detailed materials to support the training teams use of the methodology. Specific activities during this past work period included:

- Refinement of the "Gantt" chart detailing the timing and coordination of tasks
- Development and refinement of templates, job aids and deliverables for the Plan It! phase
- Development of the Design It! phase approach and materials

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The next phases of work will include:

- Completion of the Plan It! and Design It! phase deliverables
- Initial development of the Build It! phase approach and materials
- Support of Spring Training / COD team during course design process
- Documentation of planning considerations surrounding training program design and development (both existing and future processes)
- Initial development of materials for introducing the process to training teams

The team has identified the following milestones:

- Plan It documents ready for review by January 6, 2002
- Design It documents ready for review by January 6, 2002
- Framework for Built It prepared by February 1, 2002

Delivery cost assessment

An initial analysis of course information from SFA University's 1999 Annual Report on Training has identified opportunities to reduce the costs of delivering training either through alternative delivery channels or revisions to training contracts. Preliminary results were reviewed and the need was identified to conduct a delivery cost assessment of which courses to target for cost reduction. This effort has created the Cost Analysis team which is in the process of developing a tool to quickly analyze and compare the costs of developing and delivering training. This tool will assist SFA University in their training investment decisions. Activities during this period included:

- Development of a cost analysis project approach
- Documentation of cost model comparisons
- Identification and documentation of cost drivers
- Development of the cost analysis model

Specific activities in the next period will include:

- Continued development of the cost analysis model
- Development of reporting and analysis procedures
- Identification of the communications required to deploy the cost analysis model
- Detailed research of the costs of one course and identification of the related process and tools

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LMS Support

During this period, support focused on beginning the configuration of the LMS and completing the contractual requirements with vendors.

Training Development Center (TDC) Support

Support was provided to SFA University and TDC to further define the strategic relationship between the two organizations. These discussions focused on how the two organizations can work together to support the development needs of SFA employees as well through collaboration help each organization to achieve its business goals. Specific activities discussed as combined activities include:

- Financial controls training
- Financial management certification program
- Clinger-Cohen training
- TDC LMS for employees

Project Management

Project management support continues to be provided to assist SFA University formalize the role of its project managers. This information identifies the role, tasks and tools an SFA University project manager will leverage. Future activities may include meeting and workgroup facilitation.

Observations/Recommendations

During the period November 1 – November 30, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- Project management training could offer a common language and approach for SFA University staff. Though several employees have previously attended similar training, identifying one recommended training program would enable all staff members to share a common approach to project management, in both terminology and documentation, thereby enhancing their ability to work effectively within and between teams. Several courses could be reviewed for applicability and access, with the goal of identifying one program for all staff to attend.

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- The new standard training process could be introduced to teams prior to application by the team for course development. This would allow training team members to gain comfort with the process, and its corresponding tools and templates, before applying it to their respective training development efforts. Acceptance of the training process itself will encourage full use of its tools, thereby enhancing its benefits.
- To fully utilize the new standard training process, it should be recognized that each training program fits into a larger scheme of training offerings. Strategizing according to this larger view, putting each training program into perspective, will enable teams to better predict staffing needs and availability as well and identify potential scheduling or logistical conflicts. An initial approach to managing this effort is documenting and maintaining a comprehensive list of training offerings throughout the year, which allows teams to view their programs within the context of the larger SFA University picture.
- In joint online development ventures between SFA University and SFA CIO, teams should have a clear and shared understanding of the development process. One approach to assist in this area would be a raised awareness of the Software Lifecycle Process (SLC) and other “roadmaps” that highlight requirements for these projects.
- To secure its role as a strategic partner with both SFA and the Department, SFA University should identify which programs directly support recommendations listed on the MIT (Management Improvement Team) report.

Attachments:

- Cost Analysis materials
 - Cost Analysis Project Approach
 - Cost Model Comparisons
 - Cost Drivers
- Training Process Team materials
 - Updated Gantt chart
 - Progress Matrix
 - Design It outline
 - Kick-off workshop checklist
 - Plan It workshop lessons learned